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CASE STUDY

HOW MSI MECHANICAL SYSTEMS, INC. TRANSFORMED SERVICE DELIVERY AND EFFICIENCY WITH SERVICETRADE

For nearly 30 years, MSI Mechanical Systems, Inc. (MSI), based in Salem, NH, operated with a traditional paper-based workflow. But as the company grew, so did the inefficiencies; missed details, delayed billing, and limited visibility into service history. In 2023, MSI took a leap forward by partnering with ServiceTrade to digitize their operations and unlock new levels of efficiency, accountability, and customer satisfaction.

FINDING A RIGHT-SIZED SOLUTION FOR SERVICE

MSI, founded in 1995, had grown to a \$10+ million operation with over 20 employees. Yet, despite the scale, their operations remained rooted in paper and spreadsheets. President Brian Hooper and Office Manager Brandi Shaver knew that growth would require better tools, but their search was frustrating.

“We looked at a lot of different solutions over the years,” said Brian. “Most were either too big, too construction-focused, or just didn’t understand the service side of our business.”

The turning point came when they evaluated ServiceTrade. Unlike previous systems, ServiceTrade offered a service-first approach with features tailored to MSI’s needs, without unnecessary complexity.

Industry



Mechanical

Size

16

Techs

Location



New Hampshire

up to **1 hr**
Saved Per Work
Order Retrieval

24 hr
Invoice Submission
After Service

Challenges

- Inefficient paper processes slowing business growth
- Delayed billing process strained cash flow
- Lack of clear documentation led to customer disputes

Solutions

- Centralized information enabled quicker responses
- Instant invoicing accelerated cash flow
- Automated service reports strengthened customer satisfaction

Results

Transitioned from a slow, paper-heavy operation to a fully digital service model that improved internal efficiency, accelerated cash flow, and strengthened customer trust.

A DELIBERATE, TEAM-CENTERED TRANSITION

MSI approached implementation with intention and empathy. They understood that transforming an entrenched process wouldn't happen overnight, especially with a diverse workforce ranging in age and tech comfort levels.

Brandi led a company-wide rollout meeting, walking the team through the "why" behind the change and showcasing how ServiceTrade would simplify their day-to-day work. Follow-up sessions are scheduled every six months to reinforce best practices and answer questions. Field and office teams are required to complete ServiceTrade certification training to build confidence and consistency.

Brian acknowledged the short-term challenge: "We had to do everything twice for six months, paper and digital. It was an investment. But we knew we had to take the plunge to be competitive long-term."



" It used to take 30 days to send out a bill. Now we're invoicing for labor the same day the job is completed. "

Brian Hooper

President,
MSI Mechanical Systems

DIGITIZATION FROM THE FIELD TO THE FRONT OFFICE

With ServiceTrade, MSI equipped technicians with iPads that gave them real-time access to asset histories, preventative maintenance checklists, and digital forms. This change alone delivered an immediate upgrade to field visibility and communication.

ServiceTrade's ability to attach photos, videos, and notes directly to service reports empowered technicians to better document their work and prove value to customers. One technician even used his iPad to resolve a skeptical customer's concerns during a preventive maintenance visit, walking them through the full checklist and accessing manufacturer specs on the spot.

For the office staff, ServiceTrade eliminated time spent interpreting handwritten notes and chasing down paperwork. Previously, pricing out deficiencies

and preparing repair quotes could take days. Now, Brandi and the team can instantly pull up records, identify parts, and prepare proposals during the same call.

Even billing saw a dramatic shift. "It used to take 30 days to send out a bill," said Brian. "Now we're invoicing for labor the same day the job is completed."



RESULTS: EFFICIENCY, TRANSPARENCY, AND A BETTER CUSTOMER EXPERIENCE

Improved Workflow & Time Savings

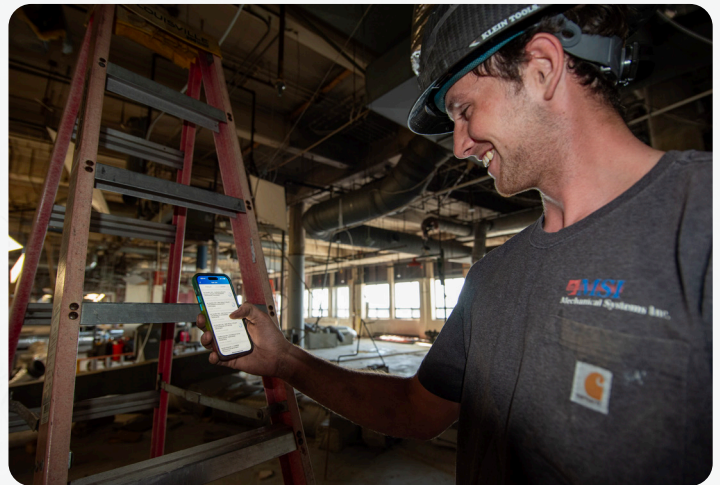
- **Faster billing:** Invoicing dropped from 30 days to same-day
- **Accessible data:** Technicians no longer need to remeasure or recheck as previous work details are now at their fingertips
- **Efficient documentation:** No more deciphering handwriting or digging through file cabinets

Better Customer Experience

- **Transparency and trust:** Customers receive clear service reports with photos and videos
- **Dispute resolution:** Visual documentation helps MSI proactively address customer concerns and eliminate unfounded complaints
- **On-the-spot answers:** Technicians can explain work using digital checklists and product specs, improving credibility and service

Growth Potential

With the core system in place, MSI is already planning to expand its use of ServiceTrade with SalesManager to digitize contracts and fully move off paper files and servers. Their preventive maintenance contracts, roughly 20% of the business and generating ~\$2M in recurring revenue, stand to benefit most from a fully cloud-based workflow.



LOOKING AHEAD

For MSI, ServiceTrade wasn't just a software implementation, it was a cultural shift. It required patience, leadership, and a commitment to training, but the payoff has been clear: a more modern, responsive service operation that positions MSI for continued growth.

"Change is hard," said Brian. "But if you want to improve and compete, you have to embrace it. ServiceTrade helped us make that leap."

GET STARTED TODAY

See how ServiceTrade can help optimize information, accelerate cash flow, and utilize automatization for your operations.



Get a Demo